

Form Builder

What Can I do Here?

- Create a form within a content page
- View the responses you've received
- Export information and reports
- Manage responses to form inquiries

The screenshot displays the AVID CMS Web Site Management Console interface. At the top right, there are links for "Change Password", "Visit Site", and "Log Out". The main content area is titled "AVID eTools™" and is organized into several sections:

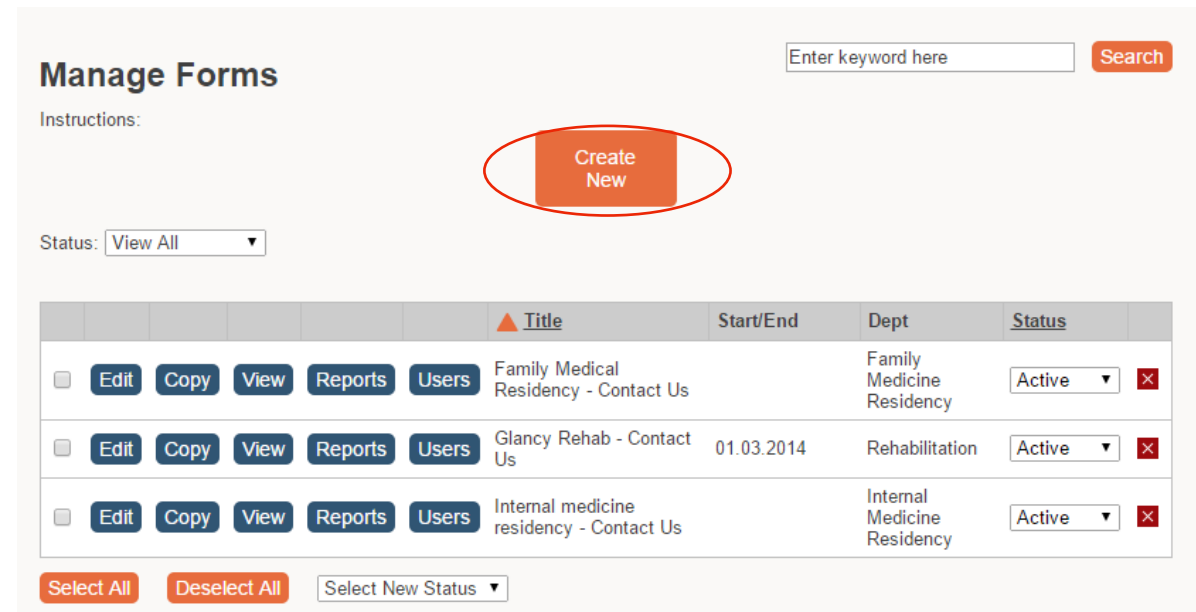
- Classes & Events:** Includes buttons for "Manage Classes", "Manage Templates", "Manage Locations", "Manage Tags", "Manage Categories", and "Archive Classes".
- eNewsletter:** Includes buttons for "E-Newsletters", "Email Groups", and "Email Addresses".
- Form Builder:** This section is circled in red and contains buttons for "Manage Forms" and "Manage Default Set".
- Forms:** Includes buttons for "Contact Us", "Lab Outreach", "Robotic Contact", "Women's Health", "Cosmetic Services Requests", and "GME Contact Us".

On the left side of the console, there is a vertical navigation menu with icons and labels for: "Manage Users", "Department and Content", "Global Settings", "Universal Navigation", and "Homepage".

Form Builder

Building a new form

- Clicking “manage forms” on the main dashboard will bring you to this view
- View all current forms
- Click the orange “Create New” button to begin a new form



Manage Forms

Instructions:

Status:

						▲ Title	Start/End	Dept	Status	
<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Copy"/>	<input type="button" value="View"/>	<input type="button" value="Reports"/>	<input type="button" value="Users"/>	Family Medical Residency - Contact Us		Family Medicine Residency	Active	<input type="button" value="x"/>
<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Copy"/>	<input type="button" value="View"/>	<input type="button" value="Reports"/>	<input type="button" value="Users"/>	Glancy Rehab - Contact Us	01.03.2014	Rehabilitation	Active	<input type="button" value="x"/>
<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Copy"/>	<input type="button" value="View"/>	<input type="button" value="Reports"/>	<input type="button" value="Users"/>	Internal medicine residency - Contact Us		Internal Medicine Residency	Active	<input type="button" value="x"/>

Pro-tip: Love someone's form? Don't re-invent the wheel. Hit "copy" next to the form you love to save time.

Form Builder

Building a new form

- Complete Title, Description
- Click the Create Content Page. Two new options appear. Select a department. Then select a Layout Template, you must choose a layout with with Form Builder option: Main Content Page, Hospital Subsite, Service Line Content, Content Full Page or Careers Content Page with Form Builder
- Click “Secure Form” and “Captcha” for all forms
- Click “Save and Continue”

Form Edit

Title:

Description:

Create Content Page:

Dates: Start: End:

Layout Columns:

Secure Form? Captcha?

[Save and Continue](#)

Create Content Page:

Department:

Layout Template:

Form Builder

Setting Up Email Info

- Check the Email Info box
- Select “Edit” to bring up the Email Information form.
- Enter email address(es), separated by commas
- Select Form Field from Addresses
- Subject: Enter the title of the form (web form)
- Select the “Include user input” box if you want the information emailed to the recipients
- Select “Apply” to save

Form Edit

Title:

Description:

Content Page Id:

Dates: Start: End:

Layout Columns:

Email Info: [Edit](#)

Created By: avidampm
Last Modified: 09/04/2018 02:40 PM
Approved By:
Last Approved:
Status: Draft Active Archived

Email Information

Notification admin email(s)

Recipients:
(Separate emails with commas. Leave blank if notification not needed.)

Form field used for FROM address in email:
Nominee Information
Name (individual or organization)
Primary Contact
Address
(If not selected, default from address is used.)

Subject:

Include user input:
Please Note: For HIPAA compliance, online submissions or email notifications should NOT include any personal or protected health information (PHI) that relates or references any past, present or future physical or mental health condition of any individual.

Reply Email

Form field used for TO address in email:
Nominee Information
Name (individual or organization)
Primary Contact
Address
(If not selected, reply email will not be sent.)

From email address:

Subject:

Message:

Form Builder

Setting Up Thank You Page Content

- Selecting this option will create a thank you page that will appear after the form is submitted.
- Check the Thank You Page Content box
- Select “Edit” to bring up the Thank you content page
- Type in the Thank you page message and click “Apply” to save

The screenshot shows the 'Form Edit' interface. It includes fields for Title (Test), Description (Test), Content Page Id (/ContentPage.aspx?nd=-1), Dates (Start and End), and Layout Columns (2 columns). On the right, there are fields for Created By (avidampm), Last Modified (09/04/2018 02:40 PM), and Approved By. A status bar shows Draft, Active (selected), and Archived. At the bottom, there are checkboxes for Email Info, Thank You Page Content (checked and circled in red), and Custom Style, each with an 'Edit' link.

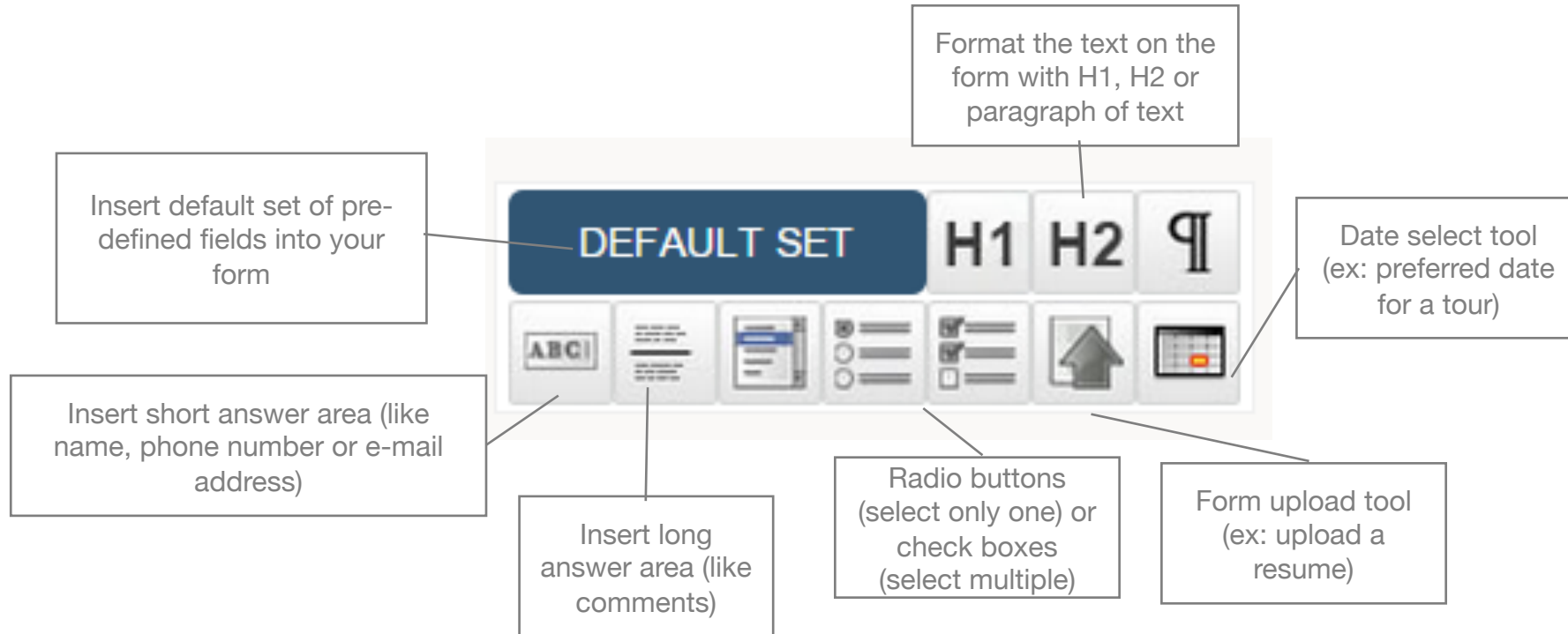
Thank you content:

The screenshot shows the 'Thank you content' editor. It features a rich text editor toolbar with options for Source, Undo, Redo, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Table, and other formatting tools. The text area contains the following message: "Thank you for nominating a Community Health Hero. Our Community Health Committee will review all nominations and select the award recipients that best meet the criteria listed above."

Apply Cancel

Form Builder

Form Builder Ribbon



Form Builder

Default Set & Reordering Fields

- If you select “Default Set”, these 9 fields will populate.
- If you want to reorder the display of the fields, you can use the orange up and down buttons or select the item and change the number under Order

Form Fields

To insert a form field, click a Form Field Type from the field types task bar to the right.
To edit an existing form field, click an existing form field row below.

1	▼	✕	Text Box	First Name *	<input type="text"/>	
2	▲	▼	✕	Text Box	Last Name *	<input type="text"/>
3	▲	▼	✕	Text Box	Address 1 *	<input type="text"/>
4	▲	▼	✕	Text Box	Address 2 *	<input type="text"/>
5	▲	▼	✕	Text Box	City *	<input type="text"/>
6	▲	▼	✕	Dropdown	State *	<input type="text" value="Please Select"/>
7	▲	▼	✕	Text Box	Zip *	<input type="text"/>
8	▲	▼	✕	Text Box	Email *	<input type="text"/>
9	▲		✕	Text Box	Phone Number *	<input type="text"/>

Text Box Options

Order:
Leave blank to place at end

Name:

Label:

Form Builder

Building a new form

- Insert Name (what you will see) and Label (what the user will see)
- Is the user required to answer?
- For dropdowns, buttons and check boxes: add answer options one at a time.
 - Be sure to hit “add” after each option
 - Be sure to hit “apply” when you are done

The screenshot shows a form titled "Radio Buttons Options" with the following fields and controls:

- Order:** A text input field with a small note below it: "Leave blank to place at end".
- Name:** A text input field.
- Label:** A text input field.
- Required:** Radio buttons for "Yes" and "No", with "No" selected.
- Size/Columns:** A text input field.
- CSS Class:** A text input field.
- Options:** A text input field followed by an "Add" button.
- At the bottom, there are two orange buttons: "Apply" and "Cancel".

Pro-tip: Need to add a new question in the middle of the form? No problem! The items will re-number themselves to accommodate your new item.

Form Builder

Other form fields

- Text Area
 - Max Length select between 200 and 500 depending on the length of the answer
 - Size: 10 rows
- Radio or Checkboxes
 - CSS: add “radio-section”
- Dropdown state listing
 - CSS: “drop-select-three” and Options: “States”

Text Area Options

Order: Leave blank to place at end

Name:

Label:

Required: Yes No

Validation:

Size/Columns:

Max Length:

Rows:

Default Value:

CSS Class:

Radio Buttons Options

Order: Leave blank to place at end

Name:

Label:

Required: Yes No

Size/Columns:

CSS Class:

Options

Dropdown Options

Order: Leave blank to place at end

Name:

Label:

Required: Yes No

CSS Class:

Notify Email

Options

Form Builder

Accessing form data

- On the forms list, select “Reports” from the form you want to retrieve data
- View the form details or export the information into a xls spreadsheet by selecting “Export”
- To export all the information, select Export All at the top of the page
- Once viewed, you can change the status from “New” to “Archive”

					▲ Title	Start/End	Dept	Status
<input type="checkbox"/>	Edit	Copy	View	Reports	Users	Ask a Clinical Question (Knowledge Management Services)	Clinical Resources	Active <input type="button" value="v"/> <input type="button" value="x"/>
<input type="checkbox"/>	Edit	Copy	View	Reports	Users	Ask the Librarian	Community Health Library	Active <input type="button" value="v"/> <input type="button" value="x"/>
<input type="checkbox"/>	Edit	Copy	View	Reports	Users	Audio Conference	Services	Active <input type="button" value="v"/> <input type="button" value="x"/>

Form Reports: Ask the Librarian

Status:

DateCreated	Status	Details		Field Label	Field Value
<input type="checkbox"/>	<input type="button" value="New"/> <input type="button" value="v"/>	<input type="button" value="View"/>	<input type="checkbox"/>	Name	Keri Amlotte TEST
<input type="checkbox"/>	<input type="button" value="New"/> <input type="button" value="v"/>	<input type="button" value="View"/>	<input type="checkbox"/>	Email	kamlotte@mhc.net
			<input type="checkbox"/>	Telephone	231-392-7169
			<input type="checkbox"/>	Address 1	1105 Sixth St.
			<input type="checkbox"/>	Address 2	
			<input type="checkbox"/>	City	Traverse City
			<input type="checkbox"/>	State	MI
			<input type="checkbox"/>	Subject	Forms Test
<input type="checkbox"/>			<input type="checkbox"/>	Message	Hi, This is a test of the new forms module. Please forward notification to kamlotte@mhc.net. Thank you.